HOUSING MARKET INFORMATION

SENIORS' HOUSING REPORT
Saskatchewan

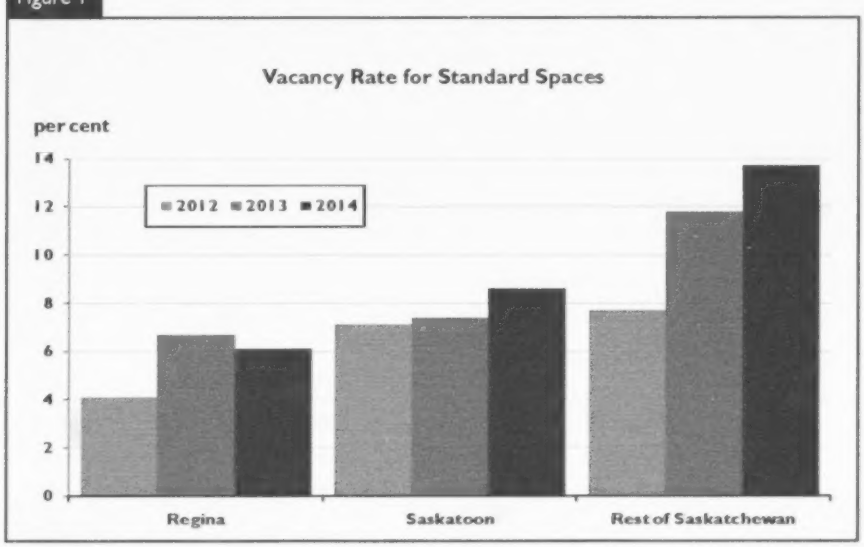
CANADA MORTGAGE AND HOUSING CORPORATION

Date Released: 2014

Highlights

- Saskatchewan had an overall vacancy rate of 9.9 per cent for standard spaces in retirement homes in 2014, compared to 8.8 per cent in 2013.
- Saskatoon and Regina, the two largest urban centres, reported standard unit vacancy rates of 8.6 per cent and 6.1 per cent, respectively.
- The overall average rent in Saskatchewan for a standard retirement space was $2,713 in 2014, compared to $2,505 one year prior.
- The 2014 survey identified 168 seniors' residences in Saskatchewan, containing a total of 6,404 standard and non-standard spaces and housing 6,373 residents.

Figure 1



Source: CMHC

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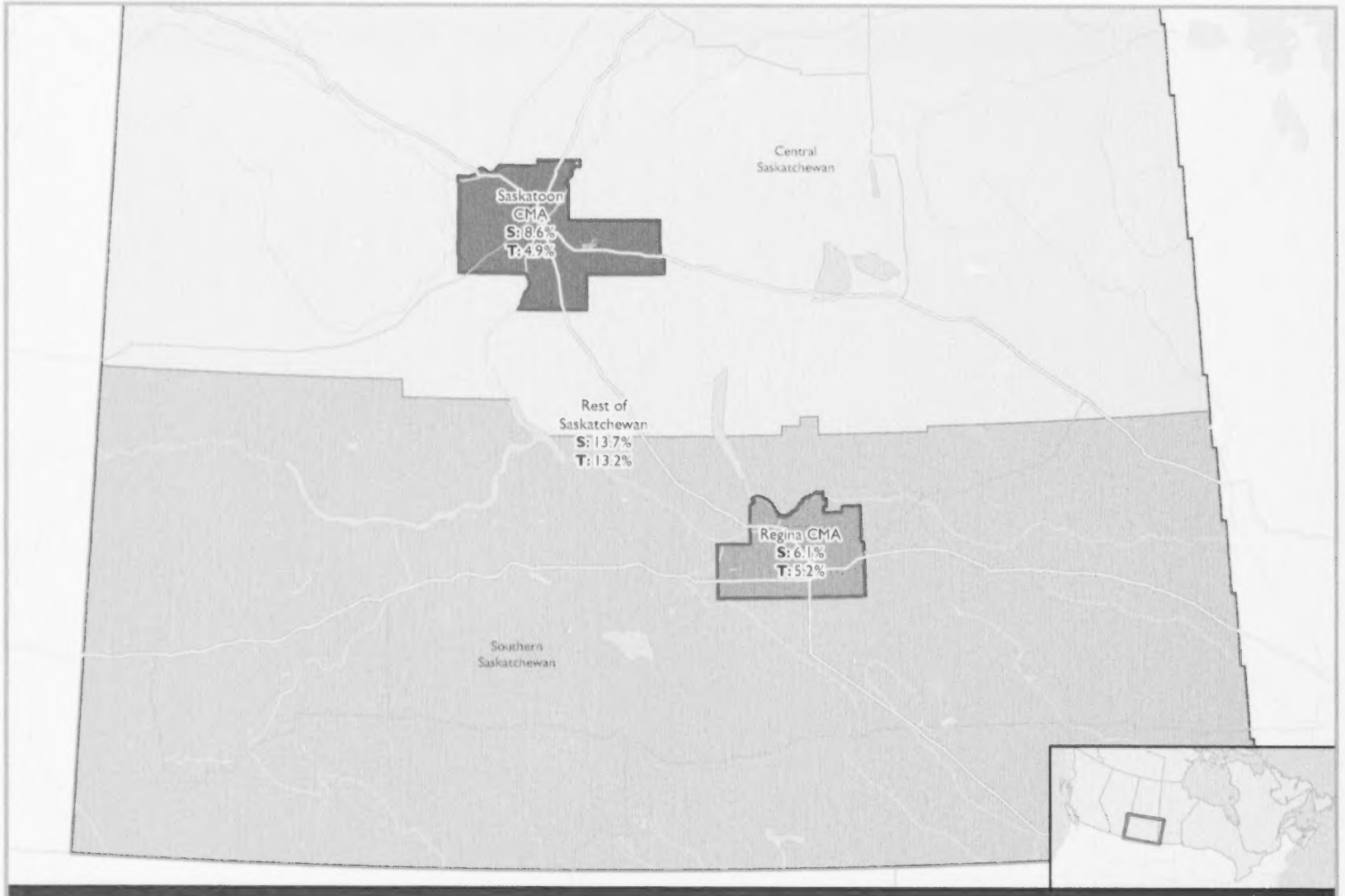


SASKATCHEWAN VACANCY RATE OF STANDARD AND TOTAL (UNIVERSE) SPACES

Province Total
S: 9.9%
T: 7.6%

S: Standard Spaces
T: Total Spaces (Universe)

Number of Structures
1 - 30 | 31 - 34 | 35 - 38 | 39 or more

0 25 50 100 km

Vacancy Rates

Vacancy rate for standard care units continues to rise

According to Canada Mortgage and Housing Corporation's (CMHC) 2014 Seniors' Housing Survey, the average vacancy rate for a standard retirement space in Saskatchewan was 9.9 per cent in 2014, compared to 8.8 per cent in the year prior. CMHC's survey targeted private and non-profit facilities where the majority of residents are over the age of 65 and have access to additional services not offered in traditional rental structures such as a meal plan, housekeeping, and laundry services.

Demand for seniors' housing in the province has been supported by growth in the seniors' population. In 2014, there were 6,373 people living in seniors' residences in Saskatchewan out of an estimated 80,000 people aged 75 years or older. This compares to 5,832 residents out of a population of 79,600 seniors in 2013. Correspondingly, the capture rate[1] rose to 8.0 per cent during the 2014 survey, from 7.3 per cent a year earlier. Over the same period, the total number of seniors' housing spaces, including standard and non-standard spaces, rose nearly 10 per cent to 6,404 units from 5,835 in 2013. Thus, despite strong demand, the increase in supply and the ability for seniors to share accommodation within the two-bedroom and three-bedroom spaces helped push vacancies higher in 2014.

Between Saskatchewan's two Census Metropolitan Areas (CMAs), the vacancy rate for standard spaces was higher in the Saskatoon CMA at 8.6 per cent, up from 7.4 per cent in 2013. By comparison, Regina recorded a lower vacancy rate at 6.1 per cent, compared to 6.7 per cent in the previous year. In the Rest of Saskatchewan, the vacancy rate increased to 13.7 per cent in 2014 from 11.8 per cent a year earlier.

Across the province, bachelor units recorded the highest vacancy rate this year for standard spaces at 11.4 per cent, up from 7.7 per cent in 2013. The lowest vacancy rate was reported in two-bedroom and larger spaces at 6.2 per cent, compared to 6.7 per cent in 2013. At the CMA level, Regina's lowest vacancy rate in 2014 was for two-bedroom and larger spaces at 4.5 per cent, compared to 4.0 per cent in 2013. The highest vacancy rate of 7.2 per cent was for bachelor spaces. Similarly, Saskatoon's lowest vacancy rate was also found in two-bedroom and larger spaces at 1.9 per cent, while bachelor spaces also recorded the highest vacancy rate, at 11.3 per cent. Outside of the two CMAs, the lowest vacancy rate was found in one-bedroom spaces at 11.2 per cent.

The 2014 Seniors' Housing Survey identified vacancy rates for standard spaces by rent range. In Saskatoon, spaces charging a monthly rent of $2,500 or more recorded the highest vacancy rate at 11.8 per cent, while the lowest vacancy rate of 1.6 per cent was found in spaces with a monthly rent ranging from $1,500 to $1,999. By comparison, spaces charging a monthly rent of $2,500 or more per month in Regina recorded the lowest vacancy rate at 5.2 per cent, while the highest vacancy rate of 11.8 per cent was for spaces with a monthly rent ranging from $2,000 to $2,499.

Vacancies for heavy care spaces move higher

In Saskatchewan, the vacancy rate for heavy care spaces was 6.0 per cent in 2014, compared to 4.9 per cent in 2013. Heavy care spaces are classified as spaces in seniors' residences that provide 1.5 hours or more of health care per day to its residents. Examples include care for residents with Alzheimer, Dementia and mobility support residents. Typically, the additional health care services provided to residents of heavy care facilities increases the rent over standard spaces.

Rents

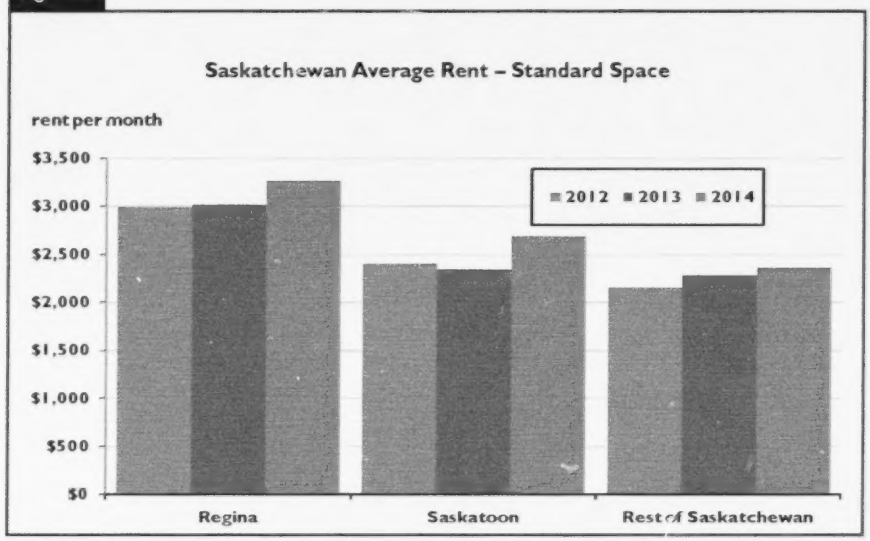
Provincial average rent for standard spaces increases in 2014

Across the province, the overall monthly average rent for a standard space in 2014 was $2,713, up from $2,505 in the previous year. The addition of newly constructed units to the universe contributed to the overall gain in rents, particularly in Saskatoon where the total number of spaces increased more than 12 per cent from 2013 to 2014. The average monthly rent in Saskatoon increased to $2,691 this year from $2,340 in 2013. In Regina, the average monthly rent was $3,260, compared to $3,011 one year prior. Meanwhile, seniors' residences in the Rest of Saskatchewan were charging an average monthly rent of $2,357 in 2014, compared to $2,282 a year earlier.

Between the province's two CMAs, Regina reported the higher average monthly rent for two-bedroom and larger spaces in 2014 at $3,941, up

[1] The capture rate is the proportion of the population aged 75 and over living in the survey universe.

Figure 2



Source: CMHC

from $3,768 one year prior. Bachelor spaces recorded the lower monthly average rent in Regina this year at $3,105. In Saskatoon, the average monthly rent for two-bedroom and larger spaces was $2,828, up from $2,554 in 2013. The average rent in Saskatoon this year for bachelor spaces was $2,636 per month, up from $2,326 in the previous year.

In the 2014 survey, almost 58 per cent of seniors' standard spaces in Saskatchewan rented for $2,500 or more per month. Meanwhile, less than four per cent of all standard spaces in the province rented for less than $1,500. According to this year's survey, nearly 22 per cent of total standard spaces in Saskatoon rented for under $2,000 per month. In contrast, Regina reported five per cent of its standard spaces with a monthly rent of less than $2,000.

Average rent for heavy care spaces rises

The average monthly rent for a heavy care space in Saskatchewan was $4,309 this year, compared to $3,597 in 2013. Typically, rents charged in heavy care spaces are higher than the average monthly rent for standard spaces as the health care service a resident requires in heavy care adds to the cost of rent. For example, the average rent for a heavy care space in Regina was $3,827 per month in 2014, compared to the average monthly rent for a standard space at $3,260.

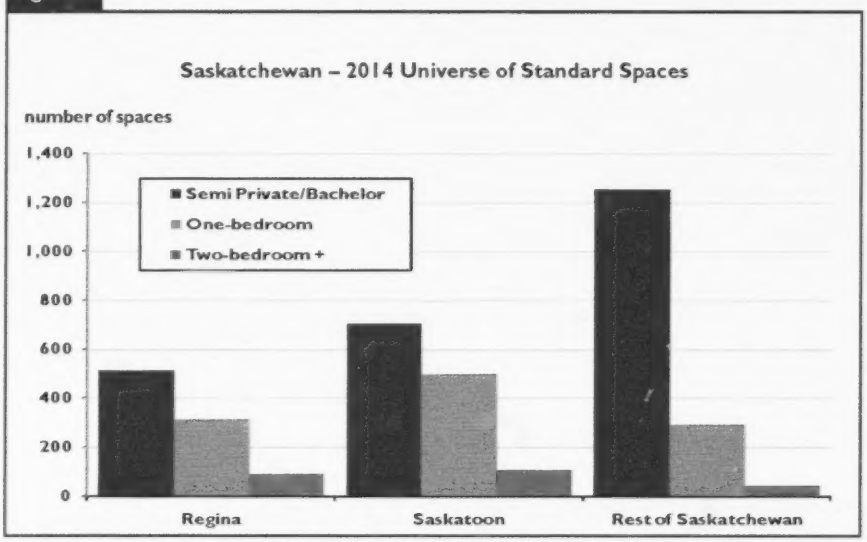
Universe

Universe of Retirement Spaces increase

There were nine new structures opened in 2012 that became eligible for the 2014 survey, bringing the total number of seniors' residences up to 168 units from 159 one year earlier. The survey also identified 6,404 retirement spaces, up from 5,835 spaces in 2013. Almost 60 per cent of these were identified as standard spaces, while the balance included non-standard spaces such as heavy care, non-market or rental subsidy spaces, and some being used to provide respite care.

Across the province, semi-private and bachelor spaces were the most common, amounting to 2,466 spaces or 65 per cent of the standard universe in 2014. The same was true for both the Regina and Saskatoon CMAs where semi-private and bachelor spaces accounted for 54 per cent and 56 per cent of the standard universe, respectively. In the Rest

Figure 3



Source: CMHC

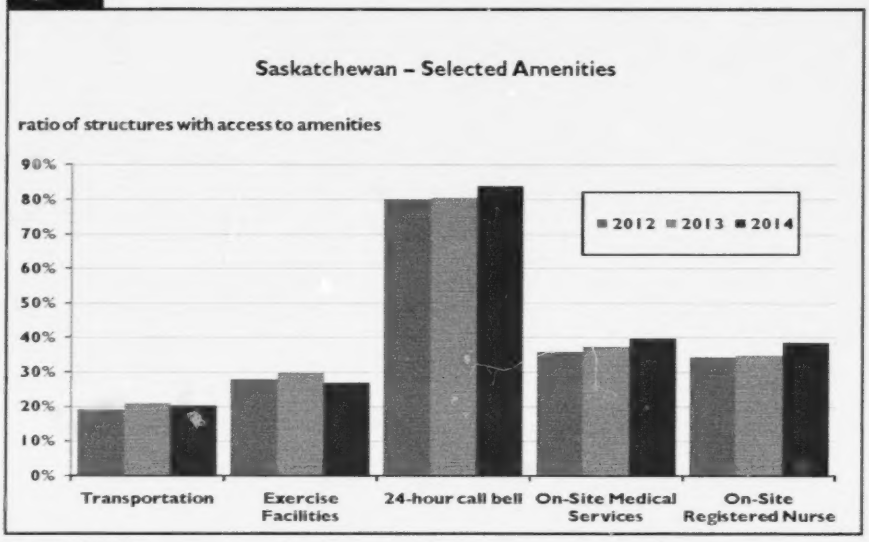
of Saskatchewan, semi-private and bachelor units made up 79 per cent of standard spaces, while the remaining 18 per cent and three per cent consisted of one-bedroom spaces and two-bedroom and larger spaces, respectively.

Services and Amenities

CMHC's 2014 Seniors' Housing Survey targeted residences where the majority of residents are seniors that have access to additional services not offered in traditional rental structures, such as an on-site meal plan. Seniors' residents were offered a variety of different amenities depending on the residence.

As was the case in past years, the most common amenity in Saskatchewan was a 24-hour bell service, which was provided in 84 per cent of structures. The second most common amenity was on-site medical services, which were available in nearly 40 per cent of seniors' residences. Other popular amenities accessible to residents included a registered nurse on site, exercise facilities, internet, and transportation services.

Figure 4



Source: CMHC

TABLES INCLUDED IN THE SASKATCHEWAN SENIORS' HOUSING REPORT

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1.1 Vacancy Rates (%) of Standard Spaces by Unit Type
Saskatchewan

Centre	Semi Private		Bachelor		One Bedroom		Two Bedroom +		Total	
	2013	2014	2013	2014	2013	2014	2013	2014	2013	2014
Regina CMA	**	**	5.0	7.2	9.6	4.8	4.0	4.5	6.7	6.1
Saskatoon CMA	**	**	9.5	11.3	6.6	6.4	1.4	1.9	7.4	8.6
Rest of Saskatchewan	47.6	**	7.9	13.5	19.1	11.2	27.8	23.3	11.8	13.7
Saskatchewan	**34.0**	**	**7.7**	**11.4**	**10.5**	**7.0**	**6.7**	**6.2**	**8.8**	**9.9**

The following units are excluded from the table above: non-market/subsidy units; respite units; and, units where an extra charge is paid for Heavy-care (1½ hours or more of care).

1.2 Vacancy Rates of Standard Spaces (%) by Rent Range ($)
Saskatchewan

Centre	Less than $1,500		$1,500 - $1,999		$2,000 - $2,499		$2,500 and more		Total where rents are known	
	2013	2014	2013	2014	2013	2014	2013	2014	2013	2014
Regina CMA	**	**	**	**	8.5	11.9	6.2	5.2	6.7	6.0
Saskatoon CMA	1.2	**	3.9	1.6	8.5	5.7	10.3	11.8	7.4	8.5
Rest of Saskatchewan	6.9	4.6	8.6	12.3	11.9	11.5	15.5	17.5	11.8	13.7
Saskatchewan	**1.8**	**1.3**	**7.7**	**8.8**	**10.6**	**10.0**	**9.5**	**10.6**	**8.8**	**9.8**

The following units are excluded from the table above: non-market/subsidy units; respite units; and, units where an extra charge is paid for Heavy-care (1½ hours or more of care). Second person extra charge is also excluded from the calculation.

1.3 Vacancy Rates (%) and Average Rents ($) of Heavy Care Spaces[1]
Saskatchewan

Centre	Vacancy Rate		Average Rent	
	2013	2014	2013	2014
Regina CMA	0.0	**	3,837	3,827
Saskatoon CMA	**	**	**	**
Rest of Saskatchewan	7.3	6.3	**	**
Saskatchewan	**4.9**	**6.0**	**3,597**	**4,309**

[1] Non-market heavy care units are excluded from Average Rents, but are included in Vacancy Rate.

The following letter codes are used to indicate the reliability of the estimates:
a – Excellent, b – Very good, c – Good, d – Fair (Use with Caution)
** Suppressed to protect confidentiality ++ Not statistically reliable -- No units exist in universe for this category

1.4 Universe, Number of Residents Living in Universe and Capture Rate (%)
Saskatchewan

Centre	Total Number of Spaces	Overall Vacancy Rate (%)		Number of Residences	Number of Residents	Estimated Population Aged 75+[1]	Capture Rate[2] (%)
		2013	2014				
Regina CMA	1,405	5.9	5.2	38	**	.....	.....
Saskatoon CMA	2,951	5.1	4.9	66	3,098	.....	.....
Rest of Saskatchewan	2,048	11.3	13.2	64	1,854	.....	.....
Saskatchewan	**6,404**	**7.2**	**7.6**	**168**	**6,373**	**80,000**	**8.0**

[1] Source: Table 11-9, Population by age group and sex, medium-growth - historical trends (1981 to 2008) scenario (M1) July 1st - Saskatchewan, 2010 to 2036. Statistics Canada - Catalogue no. 91-520-X

[2] The capture rate is the proportion of the population aged 75 and over living in the survey universe.

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** Suppressed to protect confidentiality ++ Not statistically reliable -- No units exist in universe for this category

2.1 Universe of Total Spaces by Unit Type
Saskatchewan

Centre	Semi Private / Bachelor	One Bedroom	Two Bedroom +	Total
Regina CMA	724	555	126	1,405
Saskatoon CMA	1,081	1,563	307	2,951
Rest of Saskatchewan	1,530	421	97	2,048
Saskatchewan	**3,335**	**2,539**	**530**	**6,404**

2.2 Universe by Unit Type
Saskatchewan

Centre	Semi Private / Bachelor	One Bedroom	Two Bedroom +	Total
Regina CMA	**724**	**555**	**126**	**1,405**
Standard Spaces	511	313	89	913
Non-Standard Spaces	109	60	-	169
Unknown Spaces	104	182	37	323
Saskatoon CMA	**1,081**	**1,563**	**307**	**2,951**
Standard Spaces	704	498	105	1,307
Non-Standard Spaces	301	741	138	1,180
Unknown Spaces	76	324	64	464
Rest of Saskatchewan	**1,530**	**421**	**97**	**2,048**
Standard Spaces	1,251	292	43	1,586
Non-Standard Spaces	258	36	-	294
Unknown Spaces	21	93	54	168
Saskatchewan	**3,335**	**2,539**	**530**	**6,404**
Standard Spaces	2,466	1,103	237	3,806
Non-Standard Spaces	668	837	138	1,643
Unknown Spaces	201	599	155	955

The following letter codes are used to indicate the reliability of the estimates:

a – Excellent, b – Very good, c – Good, d – Fair (Use with Caution)

** Suppressed to protect confidentiality ++ Not statistically reliable -- No units exist in universe for this category

2.3 Universe of Standard Spaces by Rent Range ($)
Saskatchewan

Centre	Less than $1,500	$1,500 - $1,999	$2,000 - $2,499	$2,500 and more
	% of Total[1]	% of Total[1]	% of Total[1]	% of Total[1]
Regina CMA	0.4	4.7	11.4	83.5
Saskatoon CMA	7.2	14.3	16.3	62.2
Rest of Saskatchewan	2.6	28.1	34.0	35.4
Saskatchewan	**3.6**	**17.1**	**21.8**	**57.5**

[1] % is based on those spaces where the rent is known.

The following units are excluded from the table above: non-market/subsidy units; respite units; and, units where an extra charge is paid for Heavy-care (1½ hours or more of care).

2.4 Proportion (%) of Structures where Select Services are Available[1] by Structure Size
Saskatchewan

Centre	Meals				On-Site Medical Services	On-Site Nursing Services[2]	24-hour call bell	Pharmacy
	Optional	# included in rent						
		1	2	3				
Regina CMA	5.6	0.0	2.8	91.7	50.0	55.6	91.7	0.0
10 - 49	3.6	0.0	0.0	96.4	46.4	53.6	92.9	0.0
50 - 89	**	**	**	**	100.0	100.0	**	**
90 or more	**	**	**	**	**	**	**	**
Saskatoon CMA	17.7	9.7	0.0	72.6	37.1	32.3	77.4	0.0
10 - 49	4.7	2.3	0.0	93.0	41.9	37.2	88.4	0.0
50 - 89	**	**	**	**	**	**	**	**
90 or more	**	**	**	**	**	**	**	**
Rest of Saskatchewan	0.0	0.0	3.1	96.9	36.4	34.8	86.3	0.0
10 - 49	0.0	0.0	3.8	96.2	**	**	85.3	0.0
50 - 89	**	**	**	100.0	62.7	62.7	87.6	**
90 or more	**	**	**	**	**	**	**	**
Saskatchewan	**8.2**	**3.8**	**1.8**	**86.2**	**39.8**	**38.5**	**84.0**	**0.0**
10 - 49	2.5	0.8	1.6	95.1	39.1	38.3	88.1	0.0
50 - 89	25.6	10.2	0.0	64.2	49.7	49.7	79.9	0.0
90 or more	28.1	**	5.6	**	**	27.7	60.6	0.0

[1] Services are considered to be included in rent for a structure if the majority of all spaces have the service included in the rent.

[2] On-site nursing services include RN, RPN or LPN.

The following letter codes are used to indicate the reliability of the estimates:

a – Excellent, b – Very good, c – Good, d – Fair (Use with Caution)

** Suppressed to protect confidentiality ++ Not statistically reliable -- No units exist in universe for this category

2.5 Proportion (%) of Structures with Access to Selected Amenities[1] by Structure Size
Saskatchewan

Centre	Transport-ation Services	Swimming Pool	Hot Tub - Spa	Movie Theatre	Exercise Facilities	Internet
Regina CMA	**22.2**	**2.8**	**16.7**	**16.7**	**	**
10 - 49	10.7	0.0	7.1	7.1	14.3	28.6
50 - 89	**	**	**	**	**	**
90 or more	**	**	**	**	**	**
Saskatoon CMA	**17.7**	**0.0**	**3.2**	**6.5**	**29.0**	**22.6**
10 - 49	11.6	0.0	0.0	0.0	11.6	16.3
50 - 89	**	**	**	**	**	**
90 or more	**	**	**	**	81.8	**
Rest of Saskatchewan	**21.4**	**0.0**	**7.9**	**1.6**	**22.2**	**23.0**
10 - 49	12.7	0.0	3.9	0.0	11.6	20.1
50 - 89	62.1	**	24.8	**	75.2	37.9
90 or more	**	**	**	**	**	**
Saskatchewan	**20.2**	**0.6**	**8.0**	**6.9**	**26.8**	**25.2**
10 - 49	11.8	0.0	3.2	1.6	12.2	20.7
50 - 89	**	5.1	19.8	10.2	64.8	**
90 or more	55.4	0.0	27.6	**	83.5	**

[1] Services are considered to be included in rent for a structure if the majority of all spaces have the service included in the rent.

3.1 Average Rent ($) of Standard Spaces by Unit Type
Saskatchewan

Centre	Semi Private		Bachelor		One Bedroom		Two Bedroom +		Total	
	2013	2014	2013	2014	2013	2014	2013	2014	2013	2014
Regina CMA	**	**	2,781	3,105	3,101	3,313	3,768	3,941	3,011	3,260
Saskatoon CMA	**	**	2,326	2,636	2,314	2,746	2,554	2,828	2,340	2,691
Rest of Saskatchewan	1,753	**	2,101	2,205	2,657	2,856	3,676	3,970	2,282	2,357
Saskatchewan	**1,829**	**1,611**	**2,336**	**2,536**	**2,639**	**2,949**	**3,194**	**3,455**	**2,505**	**2,713**

The following units are excluded from the table above: non-market/subsidy units; respite units; and, units where an extra charge is paid for Heavy-care (1½ hours or more of care).

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O1 Building Structure Makeup (%)
Saskatchewan

Centre	Concrete Frame	Wood Frame
Saskatchewan	**27.4**	**72.6**

O2 Ancillary Services, Cable and Telephone and Optional Costs (% of residences)
Saskatchewan

Centre	Services	Included in Rent (%)	Tenant Arrange (%)	Optional (%)	Average Cost if Optional ($)
Regina CMA	Cable	26.3	71.1	2.6	**
	Telephone	**	97.4	2.6	**
Saskatoon CMA	Cable	22.7	74.2	3.0	**
	Telephone	**	100.0	**	**
Rest of Saskatchewan	Cable	20.3	65.6	14.1	32.67
	Telephone	1.6	96.9	1.6	**
Saskatchewan	**Cable**	**22.6**	**70.2**	**7.1**	**33.83**
	Telephone	**0.6**	**98.2**	**1.2**	**

O3 Vacancy Rates (%) of Standard Spaces by Date Residence Opened
Saskatchewan

Centre	Before 1990	1990 - 1999	2000 or later	Total
Regina CMA	**	9.6	4.1	6.1
Saskatoon CMA	2.9	8.8	9.5	8.6
Rest of Saskatchewan	10.4	13.0	14.3	13.7
Saskatchewan	**6.6**	**10.1**	**10.2**	**9.9**

O4 Average Rents ($) of Standard Spaces by Date Residence Opened Saskatchewan					
Centre		**Before 1990**	**1990 - 1999**	**2000 or later**	**Total**
Regina CMA	Semi Private	**	**	**	**
	Bachelor	**	2,682	3,412	3,105
	One Bedroom	**	**	**	3,313
	Two Bedroom +	**	**	**	3,941
	All	**	3,024	3,415	3,260
Saskatoon CMA	Semi Private	**	**	**	**
	Bachelor	2,172	2,362	2,801	2,636
	One Bedroom	**	**	3,123	2,746
	Two Bedroom +	**	**	2,854	2,828
	All	1,703	2,554	2,918	2,691
Rest of Saskatchewan	Semi Private	**	**	**	**
	Bachelor	2,144	2,037	2,260	2,205
	One Bedroom	**	**	2,922	2,856
	Two Bedroom +	**	**	3,970	3,970
	All	2,121	2,055	2,455	2,357
Saskatchewan	**Semi Private**	**	**	**	**1,611**
	Bachelor	**2,192**	**2,365**	**2,649**	**2,536**
	One Bedroom	**	**2,885**	**3,121**	**2,949**
	Two Bedroom +	**	**3,359**	**3,536**	**3,455**
	All	**1,958**	**2,620**	**2,839**	**2,713**

The following letter codes are used to indicate the reliability of the estimates:

a – Excellent, b – Very good, c – Good, d – Fair (Use with Caution)

** Suppressed to protect confidentiality ++ Not statistically reliable -- No units exist in universe for this category

Methodology

Canada Mortgage and Housing Corporation conducts the Seniors' Housing Survey in February and March. This annual survey became national in scope in 2009, covering all centres in each of the ten provinces. Both private and non-profit residences are included in the survey universe.

To be eligible for inclusion in the survey results, a residence must:

- ✓ have at least one unit that is not subsidized;
- ✓ have been in operation for at least one year (for example, it must have started operation before January 2012 to be included in the 2013 survey);
- ✓ have at least 10 rental units (in Quebec, Ontario and the Prairies) or 5 rental units (in the Atlantic provinces and B.C.);
- ✓ offer an on-site meal plan;
- ✓ not mandate high levels of health care (defined as 1.5 hours or more of care per day) to all of its residents; nursing homes and long-term care homes are examples of residences that were not included in the survey;
- ✓ offer rental units; life lease units and owner-occupied units are excluded from this survey; and
- ✓ have at least 50 per cent of its residents who are 65 years of age or older.

The Seniors' Housing Survey is a census and not a sample survey; therefore, all seniors' residences in Canada meeting these criteria are to be part of this survey. The survey universe in Quebec may include private residences that do not meet the conditions for obtaining a certificate of compliance.

Survey data were obtained through a combination of telephone interviews and fax and e-mail responses. Information was obtained from the residence owner, manager or administrator. Survey results reflect market conditions at the time of the survey. Survey results have been weighted to adjust for non-responses, in order to ensure that they are reflective of the universe. The level of statistical reliability is noted in the data tables. For more information on the reliability of the data, please click here.

All statistics published, excluding information on new market supply, include only those residences that have been in operation for at least one year.

Definitions

Space: A space is a residential area that is rented out. Examples of spaces include one half of a semi-private unit, a private or bachelor unit, a one-bedroom unit and a two-bedroom unit. In most cases, a space is the same as a unit. The exception is the case where a unit has been divided to rent to multiple residents. Semi-private and ward units are an example of this. Unless otherwise indicated, data for spaces are for all unit types.

Standard space: A space where the resident does not receive high-level care (that is, the resident receives less than 1.5 hours of care per day) or is not required to pay an extra amount to receive high-level care. Regional terms for this type of space may vary across the country.

Heavy care space: A space where the resident is paying an extra amount to receive high-level care (1.5 hours or more of care per day). Examples of conditions that could require high-level care include Alzheimer's, dementia and reduced mobility.

Respite space: A space used to provide temporary accommodation for a senior who normally lives in another place and not at the residence.

Non-market or subsidy space: A space where the rent received for the unit is less than market rent or where the resident occupying the unit is subsidized.

Rent: The actual amount a resident pays per month for his or her accommodation space and all mandatory services. For vacant spaces, the rent is the amount the owner is asking for the space.

Vacancy: A space is considered vacant if, at the time of the survey, it is physically unoccupied and available for immediate rental.

Capture rate: The main age group living in seniors' residences are persons aged 75 years and older. Capture rate in a centre is the ratio of the total number of residents living in the survey universe divided by its estimated 75+ population, expressed as a percentage.

Acknowledgement
The Seniors' Housing Survey could not have been conducted without the co-operation of the residence owners and their staff. CMHC acknowledges their time and assistance in providing accurate information. As a result of their contribution, CMHC is able to provide data and analysis that benefits the entire industry.

Confidentiality
All information provide through this survey is kept strictly confidential and only used by CMHC to generate statistics and data sets that do not allow for the identification of individuals, households, businesses or buildings.

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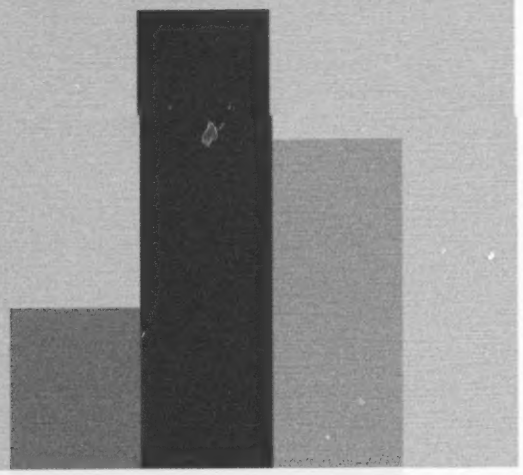

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